

# CHROME RIVER



February 24, 2022

# **Chrome River User Manual**

BGSU uses Chrome River software for university employee expense reports for both pcard reconciliation and reimbursement requests. This system aims to make the process for reconciling financial transactions efficient and user friendly with electronic receipt options, exchange rates, expense mapping, electronic approvals, and quick reimbursements.

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#### Introduction

This manual is specific to Chrome River and serves as guidance from a systems perspective. Information and policies regarding travel and reimbursements can be located on the <u>Controller's Office</u> website. The Pcard Manual can be located on the <u>Purchasing</u> website.

Reports created in Chrome River are electronically routed to the appropriate approvers by email based on the budget used on the report. The system contains policy direction that includes violation warnings. Should any of these warnings be identified, it will open a text box requiring additional information pertaining to the potential violation. Additional approvals are required via the electronic workflow for certain Pcard transactions or reimbursable expenses. Approvers will also be alerted that a report has a potential policy violation.

Expenses entered in Chrome River will not post to the budget until all necessary approvers have approved the report. Requests for reimbursements cannot be processed on the same report with Pcard transactions.

#### Logging in to Chrome River

To access Chrome River, visit <u>https://my.bgsu.edu</u>. Use your University username and password to log in. If you have difficulty accessing the site, email <u>tbachma@bgsu.edu</u> for assistance.

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ACADEMICS	ADMISSIONS	ABOUT	ATHLETICS	ALUMNI	LIBRARIES	RESEARCH	STUDENTS	INTERNATIONAL		GIVE 👬	MY <b>BGSU</b>	EMAIL
USERNAME						PASSWORD					LOGIN	×.
Welcome	Home	Librari Purct	es Emp hasing	oloyees		PCard &	Expense	e Reimburse	ement			
vaccin mit their request ID-19 we	proof of fu deadline v bsite.	Libra Textb Accer	ries books nture Rep	oort		Chrome Rive	er					
		Falco	n Outfitte	ers								

#### Navigation Bar

The navigation bar remains at the top of the screen. This allows quick access to return to the home screen or<br/>dashboard.MenuLogo/HomeHelpUser Profile

Bowling Green State University
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#### Main Menu

The menu has a list of quick links to the dashboard, credit card transactions, eReceipts, Draft expense reports, returned expense reports, recently submitted reports, and an inquiry for searching prior reports.

=	chromeriver	
<b>n</b>	Dashboard	>
=	Credit Card	>
	eReceipts	>
EXPENSES	Draft	>
	Returned	>
	Recently Submitted	>

### Dashboard

*Menu*: Quick access to the Dashboard, Receipts, Pcard expenses, Reports, Approvals.

*Logo*: Tap the Chrome River Logo in the Navigation Bar to return to the Dashboard at any time.

Help: Chromeriver Tutorials

User Profile: Select Another User, Access Account Settings, or Logout.

Navigation Bar	≡ 🖪 chror	meriver		0	鐐	Melanie Kalb 💊 Bowling Green State University
	eWallet Unused Items 3 Credit Card Items 0 Receipts VIEW ALL 3 UNUSED ITEMS			BG	SL c e s	J
Dashboard	Approvals Approvals Needed 523 Expense Reports			Please welcome Melanie Kalb who ha Purchasing System Specialist and will	s joined the	Purchasing team as a
	Expenses 3 Draft	0 Returned	Create	Falcons Purch, Chrome River and PC mkalb@bgsu.edu.	ard. Melanio Aст	e can be reach at 2-8395, More Information and Guides
			Lusi ou Daya			

# Help Menu/Tutorials

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The help center has many tutorials to help new users get started.

# User Profile: Creating Delegates

To give someone permission to submit expense reports on your behalf, go to account settings.

Click on your name and select Account Settings.



Select Add New Delegates and search for the name of the person to select.

# Chrome River User Manual

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Melanie Kalb Purchasing Systems Specialist	My Delegates
Personal Settings	A "Delegate" is someone who has full access to your account.
Preferences Settings	+ Add New Delegates
Delegate Settings	

# User Profile: Acting as a Delegate

To act on someone else's behalf, go to your profile. Click on Select Another User.



Type employee name in the search bar. Select the User.

Select Another User	×
COSS	
Teresa Coss Procurement to Pay Manager	

Select your own name from the dropdown menu to return to your dashboard.

